eFileTexas.gov

Court Administrator User Guide

Copyright and Confidentiality

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1 eFileTexas.gov Overview

Topics Covered in this Chapter

♦ Before You Begin

The eFileTexas.gov solution enables registered users to file documents with the court anytime, anywhere, 24 hours a day, seven days a week. This highly automated, scalable system provides customers the opportunity to transition from an inefficient paper-based process to a streamlined technology-based electronic filing (e-filing) system.

Before You Begin

Before you begin, there are several items you should be aware of to assist you with the successful operation of your software.

Note: Depending on your setup, all features may not be available. As a result, your screen may vary from what is shown in the document.

System Requirements

This section describes the recommended system requirements to successfully use eFileTexas.gov.

- **Browser Requirements** – eFileTexas.gov supports current versions of the Windows operating system using Internet Explorer 7 or above or Firefox. If your browser does not meet these minimum requirements, please contact your network administrator.
- **Connection Requirements** – A high-speed Internet connection is recommended.
- **Minimum Screen Resolution** – For best results, a setting of 1024x768 or better is highly recommended. If necessary, users can set their monitors to 800x600 pixels, but doing so may compromise the graphic display.
- **Document Format** – PDF is the only format allowed for attaching documents when using eFileTexas.gov.

Page Navigation

The following describes how to navigate eFileTexas.gov and populate data fields throughout the filing process.

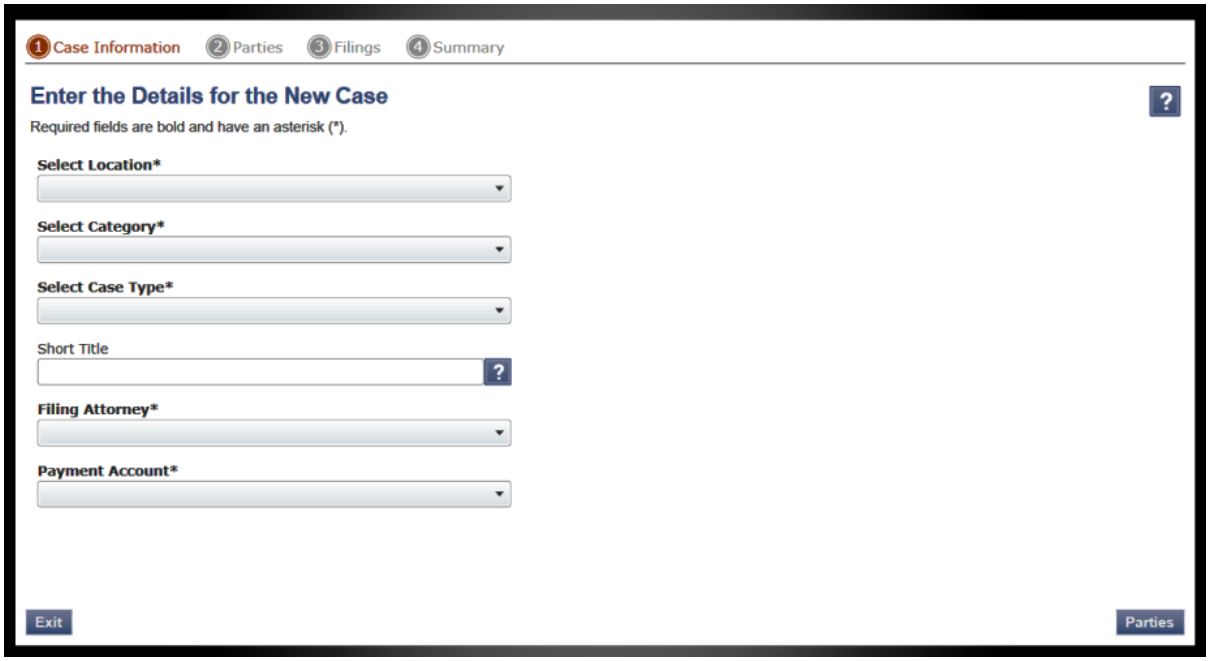


Figure 1.1 – Case Information Page

Navigate with Breadcrumbs

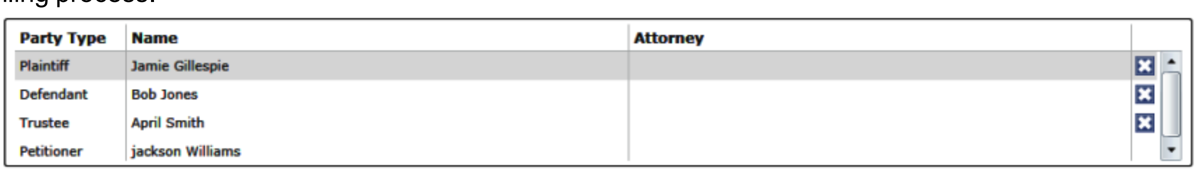
Breadcrumbs are a visual representation of the page you are currently on in the filing process. As you complete a page and move to the next page, the next page title illuminates to show you where you are in the process.

Note: Breadcrumb navigation requires information to be entered in a sequential order. You cannot move to the next breadcrumb until all of the required information on the current or previous page is completed.

Figure 1.2 – Breadcrumb Navigation

Populate the Data Table

The data table is populated using information entered or selected when completing the forms throughout the filing process.



Party Type	Name	Attorney
Plaintiff	Jamie Gillespie	
Defendant	Bob Jones	
Trustee	April Smith	
Petitioner	jackson Williams	

Figure 1.3 – Data Table

Enter User Information

The user information you enter or select populates the data table.

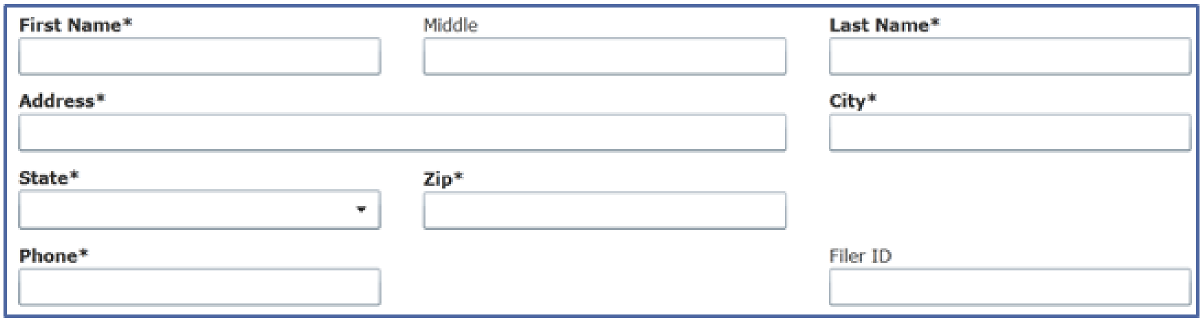


Figure 1.4 – Data Fields

Resume Filing

eFileTexas.gov automatically saves a draft of pages where you have completed all required fields. This feature allows you stop work on a filing and resume the filing at a later time. To resume filing of a saved draft, click WORKSPACE the link at the top of the page, find your case on the **Filings** screen, and click the icon to resume your filing.

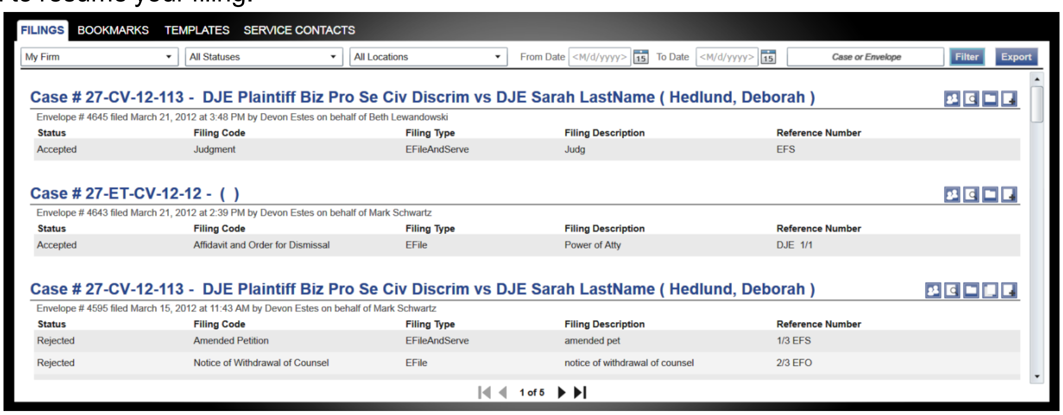


Figure 1.5 – eFileTexas.gov Workspace

Error Messages

eFileTexas.gov displays several error messages to alert users when required information is not entered or invalid information is provided.

Password Reset Error Scenarios

Invalid User – To reset the password for your account, you will need to provide the username for the account and answer the security question for the account. **Note: That user does not exist.**

No Security question on File – No security question on file for (username). Your firm administrator may still reset your password. **Note: Reset your password.**

Incorrect

Enter Data in Required Fields

Required fields are those that contain an asterisk (*) next to the field name. If you don't enter the information required into a required field and try to advance, you will receive error messages.
Note: Required fields may vary in different sections.

Look for a field outlined in red in your form. Place the cursor on the outline of the field, and a required field message displays.

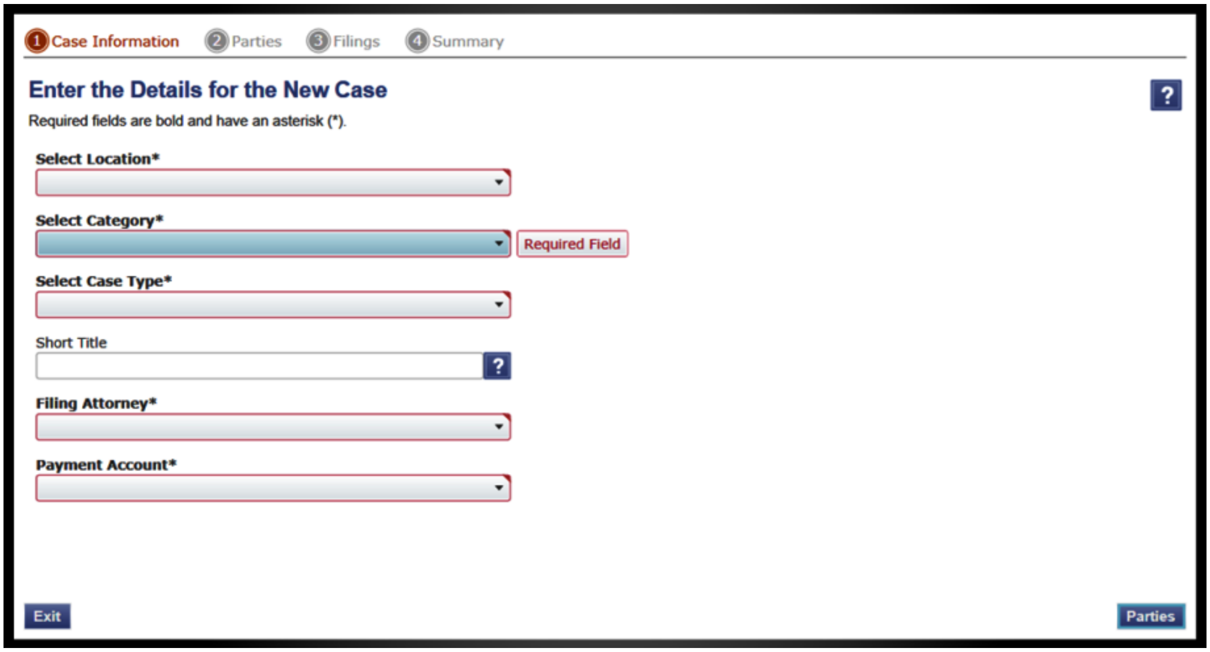


Figure 1.6 – Required Field Error Message

Receive Error Messages

When eFileTexas.gov displays an invalid error message, this means a required field must be populated to continue.

If the screen does not change when a navigation button is selected, look for a field outlined in red in your form. Place the cursor on the outline of the field, and an error message displays.

Figure 1.7 – Invalid Entry Error Message

2 eFileTexas.gov Home Page

The eFileTexas.gov home page serves as the gateway to the eFileTexas.gov system. From this screen, you can register, log in, read your court's **Message of the Day**, access the user guides, view training sessions, and get contact information for Technical Support.

Figure 2.1 – eFileTexas.gov Home Page

Login

The **Login** area allows the user to log in and use the eFileTexas.gov system. Users can log in to eFileTexas.gov by entering their e-mail address and password.

Message of the Day

The **Message of the Day** provides important messages from the court. Check this section daily for important messages from the court.

Learn

The **Learn** section has links to the eFileTexas.gov user documentation. The following types of documents available to help you answer many of your day-to-day operation questions:

- The **eFileTexas.gov User Guide** provides step-by-step instructions on using the eFileTexas.gov system. The user guide covers activities such as logging in to the system, searching for existing cases, selecting the e-file and serve options, performing an e-file and serve, and changing user settings and password.
- The **Firm Administrator Guide** is specifically for the Firm Administrator. This guides covers administrative functions such as registering the firm; managing user, payment, and attorney accounts; and creating and editing the firm's contact lists.
- The **Quick Reference Guide** (QRG) provides only the steps needed to complete common eFileTexas.gov tasks such as logging in to the system, searching for a case, initiating a new case, filing into an existing case, and reviewing the filing status.

- The **Frequently Asked Questions** (FAQ) guide lists the most frequently asked questions from the users. The FAQ covers questions pertaining to eFileTexas.gov functionality.

Training

eFileTexas.gov offers free regularly scheduled online training for eFileTexas.gov. You can register for training online and download user manuals.

- The **Web Conference Training Sessions** are scheduled according to the needs of the courts. Locate your specific court by scrolling through the list of training sessions for your court.
- **Self-study Online Training** is available by clicking on the link and choosing the topic of your choice.

Contact

The eFileTexas.gov Technical Support Team is available to assist all users by calling 855.839.3453 Monday through Friday between the hours of 7 a .m. to 9 p.m. Central Time. You can also contact a Technical Support Representative with your questions by sending an e-mail to efiling.support@tylertech.com or by using the eFileTexas.gov Chat option.

Registration

Registration is the process of registering a user in the system using their name, contact, and payment information. eFileTexas.gov requires all users – whether Firm Administrators, attorneys, or individuals representing themselves – to be registered in the system.

3 Court Administration

Topics Covered in this Chapter

♦ Approving and Rejecting New Users

The **Court Administration** section allows the Court Administrator to approve or reject new users, manage court users, and modify user accounts.

Approving and Rejecting New Users

The Court Administrator approves or rejects new users for the firm. When a user registers for the system, the Firm Administrator receives notification a user has registered and has requested to be added to the firm.

Perform the following steps to accept or reject new users:

1. Click the COURT ADMIN link on the top menu on the home page.

   The **Court Administrator** function screen opens.
2. Select the **Approve New Users** tab.

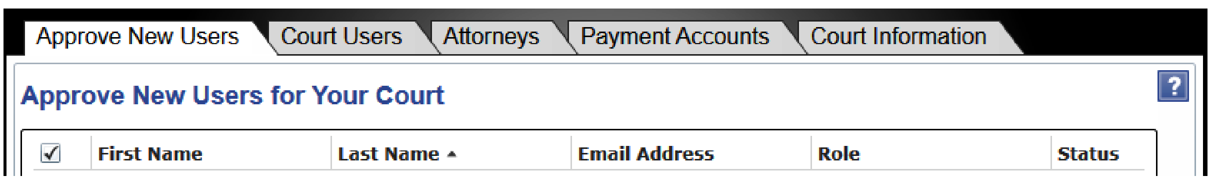


Figure 3.1 – Approve New Users Tab

3. Select the user from the list to approve or reject.
4. Click the Approve button to approve the new user, or click the Reject button to reject the new user.
5. Click the Save Changes button to save the changes and continue, or click the Cancel Changes button to cancel any changes made.

4 Manage Court User Accounts

Topics Covered in this Chapter

The Court Administrator is responsible for registering and approving new users, adding user accounts, resetting passwords, and activating and deactivating user accounts for the courts.

Adding Court User Accounts

A Court Administrator can add court user accounts.

Note: An asterisk (*) indicates a required field.

Perform the following steps to add a new user account:

1. Click the COURT ADMIN link on the top menu on the home page.

   The **Court Administrator** function screen opens.

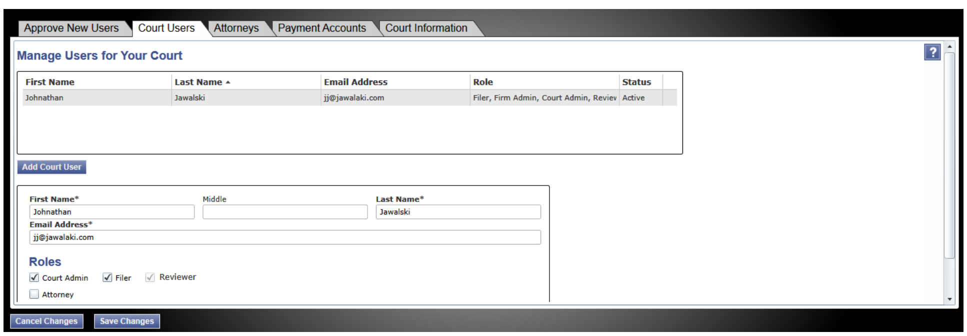


Figure 4.1 – Court Users Tab Selected

2. Select the **Court Users** tab.
3. Click the Add Court User button.
4. Complete the **Add Court User** form.
5. Assign a new court user role.

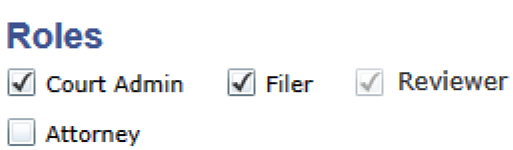


Figure 4.2 – Court User Roles

   a. Select the Court Admin check box to assign the Court Administrator role to the new user.

   b. Select Filer check box to assign the Filer role to the new court user.

   c. Select the Reviewer check box to assign the Reviewer role to the new user.

   d. Select the Attorney check box to assign the Attorney role to the new user.

6. Click the Save Changes button to save the changes and continue, or click the Cancel Changes button to cancel any changes made.

The new user information is displayed at the top of the screen.

Editing Court User Accounts

The Court Administrator can edit court user accounts.

Perform the following steps to edit the court user account information:

1. Select the **Court Admin** link on the top menu.

   The **Court Administrator** function screen opens.

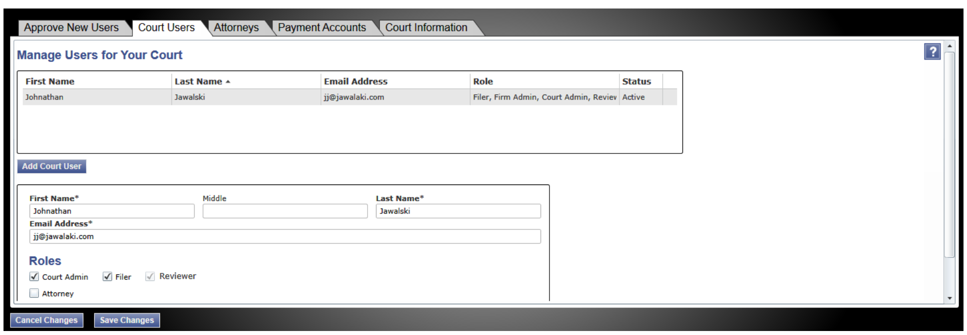


Figure 4.3 – Court Users Tab Selected

2. Select the **Court Users** tab.
3. Select the court user you want to edit from the list.
4. Edit the information in the form.
5. Click the Save Changes button to save the changes and continue, or click the Cancel Changes button to cancel any changes made.

Deleting Court User Accounts

The Court Administrator can delete user accounts.

Perform the following steps to delete a court user account:

1. Select the COURT ADMIN link on the top menu.

   The **Court Administrator** function screen opens.

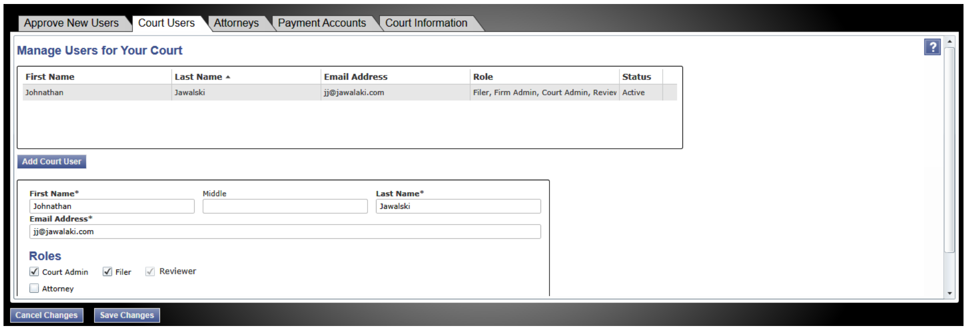


Figure 4.4 – Court Users Tab Selected

2. Select the **Court Users** tab.
3. Select the court user to delete on the list.
4. Click the button to delete the user from the list.
5. Click the Save Changes button to save the changes and continue, or click the Cancel Changes button to cancel any changes made.

5 Manage Court Attorney Accounts

Topics Covered in this Chapter

The Court Administrator is responsible for managing attorney accounts for the courts.

Adding Court Attorney Accounts

The Court Administrator can add attorneys to the court's user accounts or the attorney list. Perform the following steps to add an attorney to the attorney list:

1. Click the COURT ADMIN link on the top menu on the home page.

   The **Court Administrator** function screen opens.
2. Select the **Attorneys** tab.

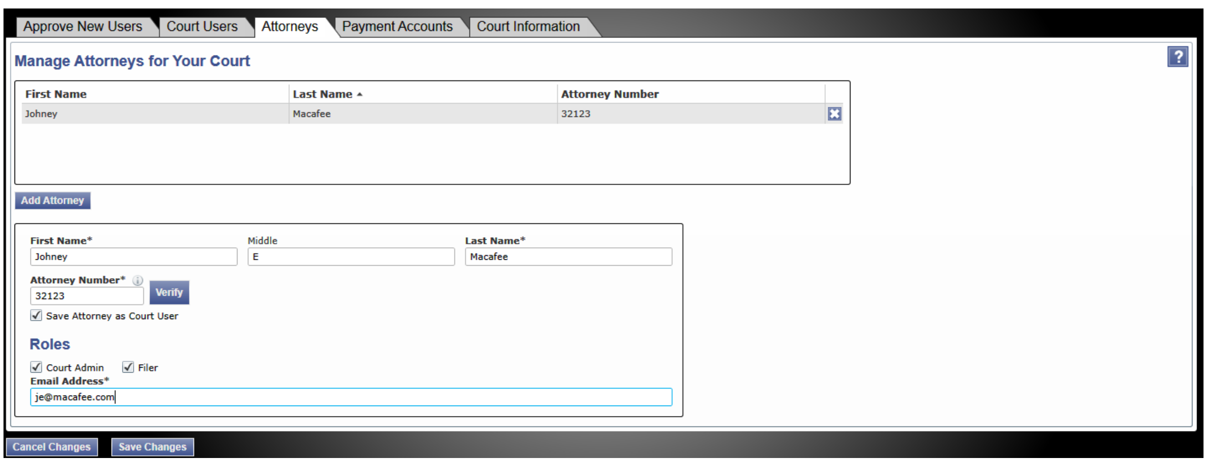


Figure 5.1 – Manage Court Attorneys Screen

3. Click the Add Attorney button.

   Note: An asterisk (*) indicates a required field.
4. Enter the attorney's first and last name in the fields provided.
5. Enter the attorney number in the **Attorney Number** field.

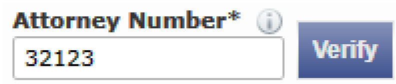


Figure 5.2 – Attorney Number Field

6. Click the **Verify** button to verify the attorney number is correct and registered with the court.

   The **Verify Attorney Information** window opens and loads the attorney information registered with the court.

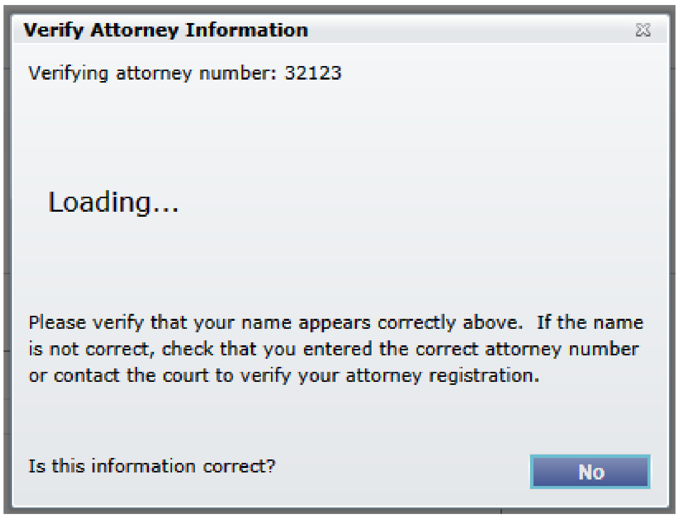


Figure 5.3 – Verify Attorney Information Window

Note: If the attorney information is incorrect, select the No button to correct the information. This takes you back to the Attorney tab.

7. Select the ☑ Save Attorney as Court User check box to save the attorney as a court user (optional).
8. Assign the court attorney roles.

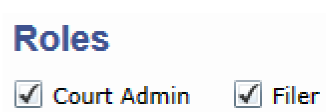


Figure 5.4 – Court User Roles

   a. Select ☐ Court Admin to assign the Court Administrator role to the new attorney.

   b. Select ☑ Filer to assign the Filer role to the new attorney.

9. Type the attorney's e-mail address.

Figure 5.5 – E-mail Address Field

10. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

Editing Court Attorney Accounts

The Court Administrator can edit the attorney's information using the **Attorneys** screen.

Perform the following steps to edit the information entered for each attorney:

1. Click the COURT ADMIN link on the top menu on the home page.

   The **Court Administrator** function screen opens.
2. Select the **Attorneys** tab.

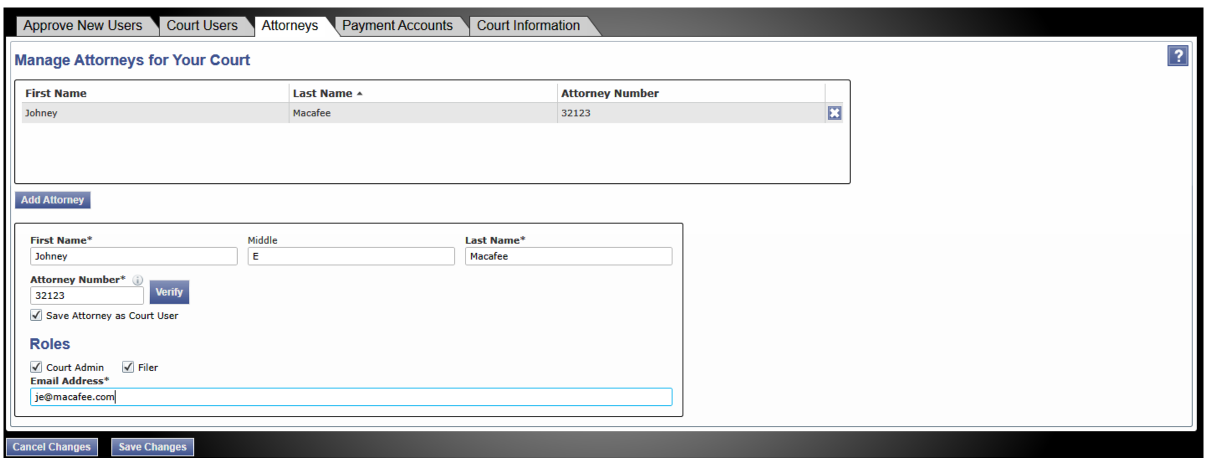


Figure 5.6 – Manage Court Attorneys Screen

3. Select the attorney you want to edit from the list.
4. Edit the information in the form.

   Note: An asterisk (*) indicates a required field.
5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

Deleting Court Attorney Accounts

The Court Administrator can delete an attorney's account using the **Attorneys** screen.

Perform the following steps to delete an attorney account:

1. Click the COURT ADMIN link on the top menu on the home page.

The **Court Administrator** function screen opens.

2. Select the **Attorneys** tab.

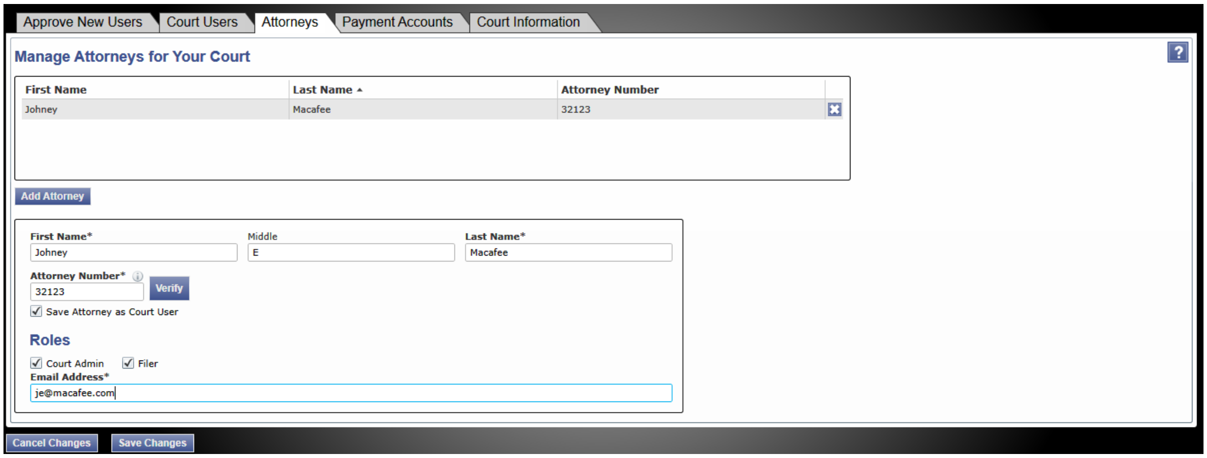


Figure 5.7 – Manage Court Attorneys Screen

3. Select the attorney you want to delete from the list.
4. Click the button next to the attorney's name to delete the attorney from the list.
5. Click the Save Changes button to save the changes and continue, or click the Cancel Changes button to cancel any changes made.

6 Manage Court Payment Accounts

Topics Covered in this Chapter

The Court Administrator is responsible for managing payment accounts for vendor and statutory filing fees. Courts can have multiple payment accounts if needed. Credit cards and waivers are both valid forms of payment for vendor and statutory fees.

Adding Court Payment Accounts

All courts are required to have a payment account in order to file electronically. The Court Administrator adds payment accounts for the courts.

Perform the following steps to add a payment account for your court:

1. Click the COURT ADMIN link on the top menu on the home page.

   The **Court Administrator** function screen opens.
2. Select the **Payment Accounts** tab.

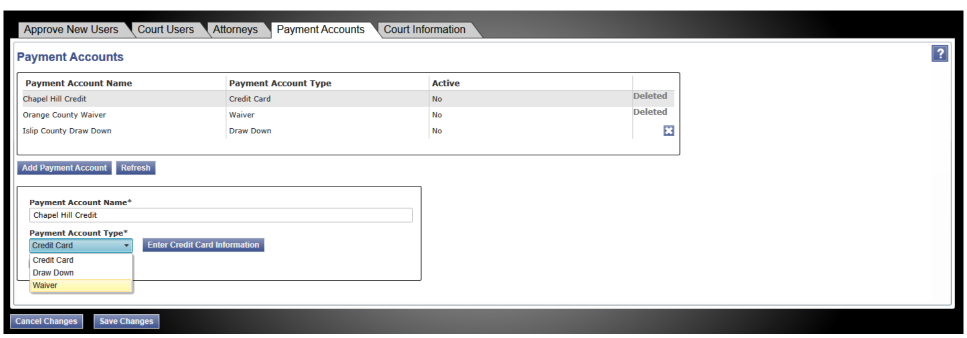


Figure 6.1 – Payment Accounts Tab Selected

3. Click the Add Payment Account button.
4. Complete the **Add Payment Account** form.
   a. Type a payment account name.
   b. Select a payment account type (credit card, draw down, or waiver) using the drop-down list.
   c. Select **Credit Card** if the payment account is a credit card.
   d. Click the Enter Credit Card Information button to enter your credit card information.

   Note: You are re-directed to a secure payment processing site to enter your credit card information.

   e. Select **Draw Down** if the payment account is a draw-down account.
   f. Click the Enter Draw Down Information button to select a draw-down account.

The **Draw Down** selection window opens.

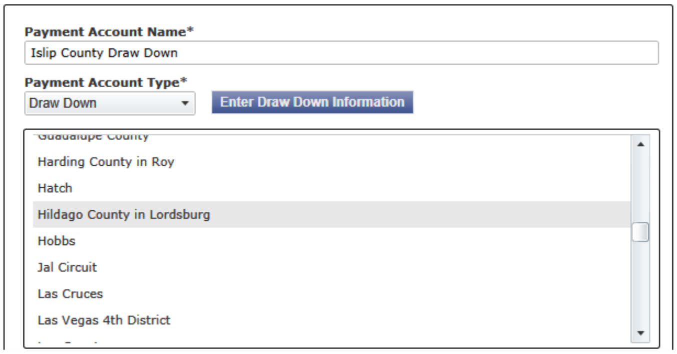


Figure 6.2 – Draw Down Selection Window

g. Select a draw-down account using the drop down list.

h. Select **Waiver** if the payment account is a waiver.

5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel** button to cancel any changes made.

   The payment account information is displayed at the top of the screen.

Editing Court Payment Accounts

After a payment account has been entered, only the payment account name and the payment account type can be changed. You cannot edit credit card information after it has been entered. Instead, delete the payment account, and add a new one.

Perform the following steps to edit a payment account for your court:

1. Click the COURT ADMIN link on the top menu on the home page.

   The **Court Administrator** function screen opens.

2. Select the **Payment Accounts** tab.

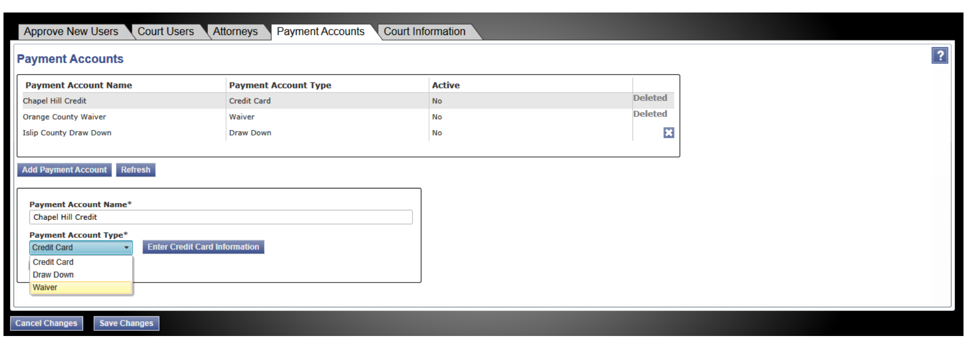


Figure 6.3 – Payment Accounts Tab Selected

3. Select the court payment account you want to edit from the list.
4. Edit the payment account name or type in the form.

5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

Deleting Court Payment Accounts

The Court Administrator is responsible for deleting payments accounts.

Perform the following steps to delete a payment account for your court:

1. Click the COURT ADMIN link on the top menu on the home page.

   The **Court Administrator** function screen opens.
2. Select the **Payment Accounts** tab.

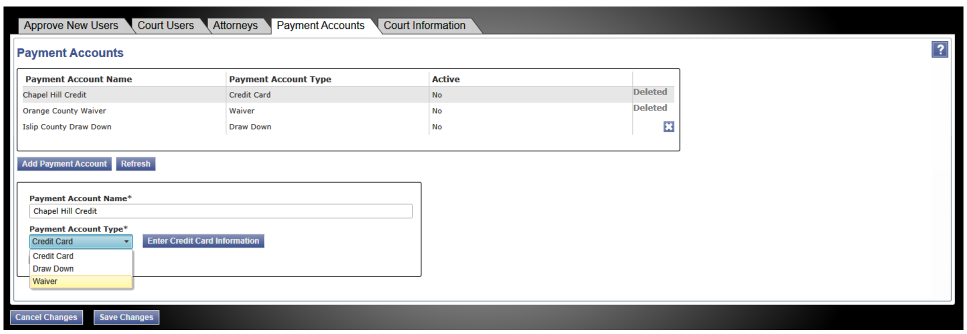


Figure 6.4 – Payment Accounts Tab Selected

3. Select the firm payment account to delete from the list.
4. Click the ☒ button next to the name in the list to delete the payment account..
5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel** button to cancel any changes made.

   The payment account information is deleted in the table at the top of the screen.

7 Manage Court Information

Topics Covered in this Chapter

♦ Updating Court Information

The Court Administrator uses the **Court Information** tab to update the contact information for the courts (name, address, phone number). The Court Administrator can also use the **Court Information** tab to manage the registration process by maintaining the authority to register new users or allowing users to self register.

Updating Court Information

Use the **Court Information** form to update your court's contact information, change how a new user registers to use the system, allow the users to self-register, or change the approval process.

Perform the following steps to update court information:

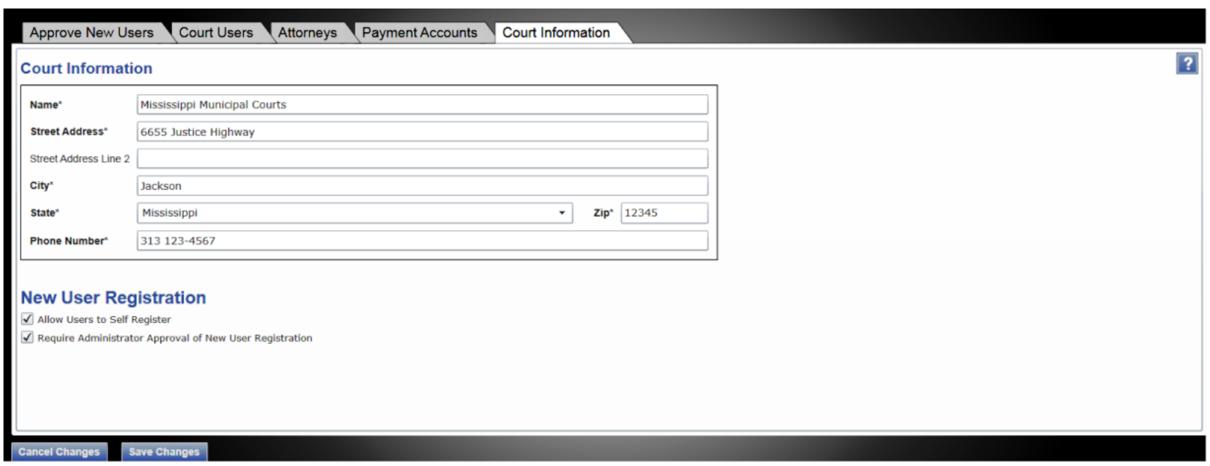


Figure 7.1 – Court User Information Screen

1. Click the COURT ADMIN link on the top menu on the home page.

   The **Court Administrator** function screen opens.
2. Select the **Court Information** tab.

   The **Court Information** window opens.
3. Update the **Court Information** form as needed.
4. Click the Save Changes button to save the changes and continue, or click the Cancel Changes button to cancel any changes made.

The information entered here updates the court's information on the **Court Information** screen.